2006-2007 Desk Reference for

EDExpress for Windows Release 1.0

Setup

Application Processing

Packaging

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Introduction to EDExpress for Windows

Using EDExpress for Windows 2006-2007, Release 1.0

With the App Express module, you can import, review, and print Institutional Student Information Records (ISIRs) sent to you by the Central Processing System (CPS). ISIRs are generated when:

- Students file the Free Application for Federal Student Aid (FAFSA)

- Students correct the Student Aid Report (SAR)

- You complete FAFSAs for students using FAA Access to CPS Online

- You make corrections to student records using FAA Access to CPS Online

- The CPS creates new ISIRs based on changes to student eligibility ("pushed ISIRs")

The FAFSA and Student Inquiry tabs in the App Express module are linked directly to the FAA Access to CPS Online Web site. FAFSAs and ISIR correction data are submitted through the Web interface directly to the CPS.

Installation of the Packaging module is optional. With the Packaging module, you can track, award, and manage federal student aid funds.

The EDExpress database is password-protected to prevent unauthorized people from opening it in Microsoft Access 2002 and viewing information protected by the Privacy Act of 1974, as amended. If you need to open the database in Microsoft Access 2002, see the topic "Database Password" in online Help.

New for 2006-2007! For compliance with Section 508 of the Rehabilitation Act, all required fields highlighted in yellow now display an "-R" at the end of the field label.

New for 2006-2007! For compliance with Section 508 of the Rehabilitation Act, fields that turn blue when the value is changed now display a "-C" at the end of the field label when the change is saved.

New for 2006-2007! For compliance with Section 508 of the Rehabilitation Act, grids display floating text descriptions of the contents of grid cells. The text appears one cell above (or one cell below, for cells in the first line of a grid) the selected cell. The text lists row number, column title, and (if applicable) the current value. Clicking once in a cell, or using the Tab key or arrow keys to move to a cell, displays the text. Clicking a second time hides the text.

The first time you log in, the default user ID and password is SYSADMIN. The system then prompts you to change the default password by entering a new password and verifying it. Floating text is always enabled for the SYSADMIN user ID and always appears in the Startup Information dialog box. To disable the floating text, select **Tools**, **Setup**, **Security Users** from the menu bar and create a new user ID and password. Exit the software, and then log in again with your new user ID and password.

For all users other than SYSADMIN, floating text is disabled by default. To enable it, select the **Enable 508 Grid Functionality?** checkbox in the Security Users dialog box.

Purpose of this Desk Reference

This desk reference provides basic instructions for using Global functions and the App Express and Packaging modules of EDExpress. For additional information, see the online Help within EDExpress.

Setting Up EDExpress

Logging In for the First Time

When you start EDExpress for the first time, the Startup Information dialog box appears with an alert that your assumed school is not defined. After you have defined your assumed school code in Global Setup, this alert no longer appears. Under certain conditions, other warnings or alerts may appear.

To log in to EDExpress for the first time:

1. Select **Start**, **Programs**, **EDESuite**, **EDExpress 2006-2007** and choose **EDExpress for Windows 2006-2007**.

2. When you see the Startup Information dialog box, click **Close**.

3. Type **SYSADMIN** for the user ID. Until you create a user ID for yourself or user IDs for others in your office, SYSADMIN is the default user ID.

4. Type **SYSADMIN** for the password.

5. Type a new password in the New Password field. You must change the SYSADMIN password the first time you log in to the software. The new password becomes the password for the SYSADMIN user ID.

   Valid passwords are one to eight characters long and can contain uppercase letters (A-Z), numbers (0-9), plus (+), dash (-), backslash (/), asterisk (*), number (#), period (.), and apostrophe (').

6. Type the new password again in the Verify Password field.

7. Click **OK** or press **Enter** to log in to EDExpress. The Prior Year Move dialog box appears, offering you an opportunity to import your prior year setup data.

8. If you want to import Global, Application Processing, and Packaging data from the 2005-2006 EDExpress database, click **Yes** to the Import Prior Year Data? prompt.

    If you do not want to import Prior Year Data, or are not sure, click **No**. You can import Prior Year Data at any time by selecting **File, Import**, **Global**, choosing **Prior Year User-Defined Queries**, **Setup, and File Formats** as the import type, clicking **OK**, and selecting the data you want to import. See "Prior Year Import" in this desk reference for more information.

Prior Year Import

When you log in to EDExpress for Windows 2006-2007 for the first time, you are prompted to import Prior Year Queries, Setup, and File Formats from the EDExpress for Windows 2005-2006 database. If you do not import prior year data when you log in for the first time, you can import it later by following the steps at the end of this section.

New for 2006-2007! File formats are now limited to a maximum of 255 fields. Only file formats with 255 fields or fewer can be imported into the current year's software.

When you import prior year file formats, all file format fields are imported, even those that include fields whose labels have changed, as long as the fields exist in the current year's software.

The following data can be imported using Prior Year User-Defined Queries, Setup, and File Formats:

Query

- Global

- App Express

- Packaging

Global Setup

- Security Groups

  Note: Security group access rights are not transferred when you import prior year Security Groups. You must reassign access rights to imported groups in Security Groups setup. See "Defining Security" in this desk reference for more information.

- Security Users

  New for 2006-2007! When you import Prior Year User-Defined Queries, Setup, and File Formats, EDExpress imports the Automatically Transmit? setting from Security Users setup.

- Document Tracking

- User-Defined Letter Text

- System

  New for 2006-2007! When you import Prior Year User-Defined Queries, Setup, and File Formats, EDExpress imports the Default E-Mail Address and Default Address settings from Global System setup.

- File Management

  Note: Import and Export file paths for 2006-2007 message classes that did not exist in the 2005-2006 award year are not changed when you import prior year File Management setup. If you want the import and export paths for the new message classes to be different than the default C:\IAM\DATA, you must change the paths in File Management setup.

  New for 2006-2007! You can import FAA Access setup from the previous year's software into the current year's software.

  New for 2006-2007! You can import Global file formats you created in the previous year's software into the current year's software.

  Note: If a file format with the same code already exists in EDExpress for Windows 2006-2007, the file format is not imported.

- User Database

Application Processing Setup

- System

- File Formats

  Note: If a file format with the same code already exists in EDExpress for Windows 2006-2007, the file format is not imported.

Packaging Setup

- Academic Year Profiles

- Fund Maintenance

- Award Methodologies

- Budgets

- SAP Values

- System

- User-Defined Formulas

- File Formats

  Note: If a file format with the same code already exists in EDExpress for Windows 2006-2007, the file format is not imported.

To import prior year data:

1. Select **File**, **Import** from the menu bar, then choose the **Global** tab.

2. Confirm that **Prior Year User-Defined Queries**, **Setup**, **and File Formats** appears as the Import Type.

3. Select **Printer**, **File**, or **Screen** as the output destination. If you want to send the report to a file, click the **File** button and name the file.

4. Click **OK**. The Prior Year Move dialog box appears.

5. Select the items you do not want to import by clearing the checkboxes in the Import column.

6. Select one of the following import options:

   - **Import All records for Setup Options Selected** imports all records without prompting you to select specific records.

   - **Import only Specific records for Setup Options Selected** prompts you to select the specific records you want to import for each group of records, such as Security Groups and Award Methodologies.

7. Click **OK**.

   If you chose Import All records for Setup Options Selected, the In Progress dialog box appears.

   If you chose Import only Specific records for Setup Options Selected, you must select the specific records you want to import for each group of records before the In Progress dialog box appears.

8. Click **OK** to close the In Progress dialog box.

9. If you selected Printer as the output destination, click **OK** to print the Import Prior Year Queries, Setup, and File Formats report.

What Is Global?

The Global module, which is installed automatically, provides core features and functionality applicable across EDExpress and available in all of its other modules. In addition to storing student demographic records and establishing default EDExpress settings, the Global module allows you to:

- Create security groups and security users

- Import prior year user-defined queries, setup, and file management; prior year demographic data; prior year user data; user-defined data; demographic data, and ED initiated imports

- Create and view demographic data

- Export external demographic data to use in spreadsheets or with external systems

- Create notes on individual student records

- Print labels, notes, letters, lists, queries, user data, setup options, record layouts, and student summaries

- Manage import and export directories

- Create user-defined fields

- Track documents

In addition, the Global module provides two database utilities, Compact and Repair Database and Verify Database.

Global Setup

Defining Security

Creating security groups is optional. If you do not need to limit access to EDExpress, you can create user IDs and assign them to the predefined EXPRESS ADMINISTRATION security group, which has access to all EDExpress functions.

If you need to restrict access to some of the functions within EDExpress for certain users, the first step is to establish *groups* that have limited access to EDExpress. The second step is to create *user IDs* and assign them to the groups you have created to specify which functions the users can access.

New for 2006-2007! You can grant or restrict access to FAA Access setup when you create security groups. Click the Global tab on the Security Groups dialog box and select or clear the checkbox in the Access column to the right of the FAA Access function under SETUP.

To create a security group:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**, **Security Groups**.

2. Click **Add**.

3. Type the name of the group you are defining.

4. Select the **Browse Only (Tabs)?** checkbox if you want the group to have read-only access to the tabs on individual student records. Access to other functions, such as importing, exporting, and using Multiple Entry, can be limited by clearing the **Access** checkboxes for these functions.

5. (Optional) In the Password Timeout field, type the number of days a group member's password is valid. If you do not want the group members' passwords to expire, leave the value at 0.

6. Click the tab for the module for which you are defining security. The security options change depending on the tab you select.

7. Select the checkboxes in the Access column to enable or disable the functions to which the group will have access. If the function's checkbox is selected, the function is enabled. For example, if you want users in a group to have access to Global setup options, click the **Global** tab, scroll down to the checkbox for Setup in the Tools group, and select the checkbox to enable access.

8. Click **Save** to add the group to the database.

9. (Optional) Repeat steps 2 through 8 to add more groups.

10. Click **OK** to return to the EDExpress main screen.

To create users:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**, **Security Users**.

2. Click **Add** (below the record count box). If this is your first record to add after installing EDExpress, skip this step and go to step 3.

3. Type a user ID in the User ID field and press **Tab**.

4. Click the **down** arrow to view a list of available security groups and select a group name. The security settings for this group are applied to the user ID you are creating.

5. (Optional) Select the **Export to EDconnect?** checkbox to export Direct Loan and Pell records to the EDconnect transmission queue automatically.

6. (Optional) Select the **Automatically Transmit?** checkbox if you want EDExpress to start EDconnect and automatically transmit your files when you export them.

7. Press **Tab** to advance to the Password field.

8. Type the password for the user in the Password field and press **Tab**.

9. Type the password again in the Verify Password field.

10. (Optional) Select the **Enable 508 Grid Functionality?** checkbox to display floating text descriptions of the contents of grid cells.

11. Click **Save** to add the user to the database.

12. (Optional) Repeat steps 2 through 12 to add more user IDs.

13. Click **OK** to return to the EDExpress main screen.

Helpful Hint!

- You can also change passwords in the Security Users dialog box. See online Help for instructions on changing passwords.

School Setup

To define an assumed school:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**, **School**.

2. If you receive the message "No Assumed School," click **OK**.

3. Click **Retrieve...** (above the **Help** button in the lower portion of the dialog box) to view the school list. Right-click on any column heading to view a menu of sorting functions to help you locate your school. You can also use the **scroll bars** to view the list.

4. Click your school's name and click **OK**. If the Federal School Code that now appears in the School Code field is the one you want for your assumed school, select the **Assumed School** checkbox. Verify that the information about your school is correct, and make changes if necessary.

5. If you will be processing applications, confirm that the **App Processing Participant** checkbox is selected.

6. Click **OK** to continue.

7. Click **Yes** to save.

Important Note

- If you are a Direct Loan school and have both an application processing school code and a DL code, be sure to use your application processing school code as the assumed school.

Global System Setup

In addition to setting up Global System options for all users, you can define certain system options for individual users. See "To set up Global System values for an individual user ID" immediately following "To set up Global System options."

To set up Global System options:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**, **System**.

2. Select the **Allow notepad entries to be edited?** checkbox if you want EDExpress users to create and edit Notes entries. If you clear this checkbox, users will be able to view Notes entries, but will not be able to create them.

3. Click the **down** arrow and select the default system (Global, App Express, or Packaging) to display when you are printing, importing, exporting, deleting, creating queries, creating file formats, and setting up security groups.

4. Type the number of days that you want to elapse before EDExpress automatically reprints another document tracking letter for document codes that have not been marked as received when you print letters again.

5. Type the number of times you want to reprint document tracking letters for each student.

6. Type the number of document tracking letters you want to print for each student each time you print these letters.

7. Select the **Return to Dialog** checkbox if you want to return to the Print, Import, or Export dialog boxes after printing a report, importing data, or exporting data.

8. Click the **down** arrow and select **Single** if you usually print a single record at a time, or select **Multiple** if you usually print multiple records at a time. This is your default setting, but you can change it for specific print jobs in the Print dialog box.

9. Click the **down** arrow and select **Printer**, **File**, **Screen**, or **E-mail** as the default report file destination.

10. Click the **down** arrow and select **E-mail Address 1** if you want all correspondence that can be printed to e-mail, such as award letters and document tracking letters, to be sent to the e-mail address in the E-mail Address 1 field on the Demo tab. Select **E-mail Address 2** if you want e-mailed reports to be sent to the e-mail address in the E-mail Address 2 field on the Demo tab.

    You can change this setting in the Print dialog box for a specific print job at any time, but your default setting remains the same until you change it in Global System setup.

11. Click the **down** arrow and select **Permanent** if you want all correspondence to be addressed to a student's permanent home address. Select **Local** if you want all correspondence to be addressed to a student's local address.

    You can change this setting in the Print dialog box for a specific print job at any time, but your default setting remains the same until you change it in Global System setup.

12. Click **OK** to continue.

13. Click **Yes** to save.

To set up Global System values for an individual user ID:

Note: Options that cannot be selected for individual users are disabled.

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**, **System**.

2. Click the **Add** button in the lower portion of the dialog box.

3. Click the **ellipsis (…)** button to the right of the User ID field in the upper portion of the dialog box and select a user ID from the list of users.

4. Click the **down** arrow and select the default system (Global, App Express, or Packaging) to display when the user prints, imports, exports, deletes, creates queries, and creates file formats.

5. Select the **Return to Dialog** checkbox if the user wants to return to the Print, Import, or Export dialog boxes after printing a report, importing data, or exporting data.

6. Click the **down** arrow and select **Single** if the user usually prints a single record at a time, or select **Multiple** if the user usually prints multiple records at a time. This is the default setting, but the user can change it for specific print jobs in the Print dialog box.

7. Click the **down** arrow and select **Printer**, **File**, **Screen**, or **E-mail** as the default report file destination.

8. Click the **down** arrow and select **E-mail Address 1** if you want all correspondence that can be printed to e-mail, such as award letters and document tracking letters, to be sent to the e-mail address in the E-mail Address 1 field on the Demo tab. Select **E-mail Address 2** if you want e-mailed reports to be sent to the e-mail address in the E-mail Address 2 field on the Demo tab.

    You can change this setting in the Print dialog box for a specific print job at any time, but your default setting remains the same until you change it in Global System setup.

9. Click the **down** arrow and select **Permanent** if you want all correspondence to be addressed to a student's permanent home address. Select **Local** if you want all correspondence to be addressed to a student's local address.

    You can change this setting in the Print dialog box for a specific print job at any time, but your default setting remains the same until you change it in Global System setup.

10. Click **OK** to continue.

11. Click **Yes** to save.

FAA Access Setup

If you are the destination point administrator (DPA) of the TG number used for CPS processing, or if the DPA has enrolled you for FAA Access to CPS Online, you can enter your FAA Access user information in the FAA Access dialog box. Although FAA Access setup is optional, you will not have to enter your personal identifiers (except your PIN) each time you create, correct, or view student records if you set up FAA Access. If you enter your FAA user information in Global Setup, you are taken automatically to the PIN entry field in the FAA Access PIN Authentication and Automation Information dialog box.

New for 2006-2007! In case you have forgotten or misplaced your PIN, the PIN Authentication and Automation Information dialog box now has the option "I forgot/don't know my PIN" that will link you into the "Request a Duplicate PIN" option on the U.S. Department of Education's PIN Registration Web site, located at pin.ed.gov.

New for 2006-2007! If you receive a message that your PIN has expired, you must apply for a new PIN at the PIN Web site, located at pin.ed.gov.

The same FAA Access authentication information you enter in Setup will log you in to the Return of Title IV Funds on the Web and ISIR Analysis Tool Web sites. To access the sites, select **View, FAA Access to CPS Online** from the menu bar, then select **Return of Title IV Funds on the Web** or **ISIR Analysis Tool**.

Note: Although access to the Return of Title IV Funds on the Web and ISIR Analysis Tool Web sites is part of FAA Access to CPS Online enrollment, it is not automatically granted to people who are enrolled for FAA Access to CPS Online and must be specifically requested by your DPA on the Student Aid Internet Gateway–Enrollment Web site. Contact your DPA if you are unsure whether or not you have been enrolled for the services.

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**, **FAA Access**.

2. Type your Social Security Number in the FAA Social Security Number field.

3. Type the first two characters of your last name in the FAA Name ID field.

4. Type your date of birth in the FAA Date of Birth field.

5. Type the TG number you use for FAA Access to CPS Online in the TG # field.

6. Type your Federal School Code, if it is not already filled in for you, in the School Code field. Or, click the **ellipsis (…)** button to select your school code from the list of codes.

7. (Optional) Type a password for saving and restoring applications and corrections in the Application Save/Restore Password field.

8. Click **OK** to continue.

9. Click **Yes** to save.

Important Notes

- FAA Access setup is disabled for the SYSADMIN user ID, so be sure to log in with a user ID other than SYSADMIN if you want to set up FAA Access for a specific user. Although you can use FAA Access to CPS Online when logged in with SYSADMIN, EDExpress does not store FAA Access user information for the SYSADMIN user ID.

- You can set up FAA Access only for the user ID with which you logged in, so be sure to log in with your own user ID before setting up FAA Access.

File Management

Use File Management to tell EDExpress where to look for files you want to import and where to put files you export. For example, if you use EDconnect to send and receive your files, the Export and Import directories in EDExpress should match the Send and Receive directories in EDconnect.

New for 2006-2007! EDExpress automatically backs up your files rather than prompting you to back them up when 1000 files of the same message class already exist in the import or export directory. If EDExpress determines that 1000 files of the same message class already exist, the software creates a backup subdirectory called "BACKUP" in your existing data directory and automatically moves the files into it. This prevents previously imported or exported files from being overwritten when you import or export new files.

New for 2006-2007! File formats are now limited to a maximum of 255 fields. Only file formats with 255 fields or fewer can be imported into the current year's software.

Follow the steps below for the Export and Import tabs in the File Management dialog box.

To set paths for import and export files:

1. Select **Tools**, **Setup**, **Global** from the menu bar.

2. Click **File Management**.

3. Click **Default** [**Export** or **Import**] **Directory**. This dialog box enables you to change the directory location of your export or import files, if necessary.

4. Click the **ellipsis (…)** button to the right of the File Path column to locate and select different directories.

5. (Optional) Click in the cells in the File Name column to change the location for specific types of files. Use the **scroll bars** to view the entire list of files.

6. Click **OK**.

Document Tracking Setup

To satisfy documentation requirements and meet school information needs, applicants must provide documents to the financial aid administrator to complete the application process. These documents can include tax returns for verification or a school aid application. EDExpress can track the request and receipt of these required documents. You can define as many tracking documents as may be required of your applicants. You can also mark each document as:

- **Automatic Request?** Use this option if you want EDExpress to assign this document automatically during the Add Documents process. EDExpress assigns documents according to the criteria you have specified. If criteria or comment codes are attached, EDExpress adds the document only to the students who meet the criteria.

- **Required to Package?** If you select this option, the document must be recorded as received before the student's aid can be packaged. If the record is already packaged, you cannot add a document that is required for packaging.

- **Required for Verification?** Your school requires this document for verification. Use this option if you want the document assigned to students selected for verification during the Add Documents process. EDExpress adds the code only when the Verification Status Code field on the demographic record is not equal to **N**. If you enable this checkbox, using the Automatic Request option is unnecessary, because EDExpress requests this document automatically from any student selected for verification.

To set up Document Tracking:

1. Select **Tools**, **Setup**, **Global** from the menu bar.

2. Click **Document Tracking**.

3. Type the information for the tracking record. Press **Tab** to move forward from field to field; press **Shift-Tab** to move in reverse.

4. Click **OK**.

Important Note

- To add documents to the records in your database, select **Process**, **Add Documents** from the menu bar. EDExpress automatically assigns the documents according to the criteria you established for each document when you set up Document Tracking.

ED-Initiated Imports Setup

ED reserves 25 message classes each award year, such as ED2507OP, to deliver additional information to you through the Student Aid Internet Gateway (SAIG).

When you receive a file in one of these message classes, follow the steps below to define the message class. EDExpress adds the report title to the Import Type list in the Global tab of the Import dialog box.

To set up ED-Initiated Imports:

1. Select **Tools**, **Setup**, **Global** from the menu bar.

2. Click **ED Initiated Imports**.

3. Click the field for the message class you are defining.

4. Click the **down** arrow and select a message class.

5. Type the report name provided by ED.

6. (Optional) Press **Enter** or click **Add** to add another import.

7. Click **OK**, then **Yes** to return to the EDExpress main window when you are finished defining message classes.

Set Up a User Database

EDExpress enables you to add your own fields to the database. These fields appear on the student's record and can be used in developing queries. You can create up to 248 user-defined fields in your database.

Note: To change a user-defined field, you must delete it and recreate it. You cannot modify user-defined fields.

You can fill user-defined data fields manually by opening a student's record, selecting the User Data tab, and entering the data, or automatically by using Multiple Entry. You can also use a Global external import file to add user-defined data fields.

To set up a user-defined database:

1. Select **Tools**, **Setup**, **Global**, **User Database** from the menu bar.

2. Click **OK**.

3. Enter the following values for each field you want to add to your database:

Parameter	Description
Field	This field is the name of the field. You can use up to 20 characters.
Type	This field is the type of data used in the field. Click the **down** arrow to display a list of types.
Length	This field specifies the length of the data: **Date: 8** **Numeric: 1-10** **Text: 1-40** **Yes or No: 1**
Description	This description is a description of the field. You can use up to 50 characters.

4. Press **Enter** or click **Add** to add additional fields.

5. When you are finished adding fields, click **OK** to continue.

6. Click **Yes** to save.

Create User-Defined User Letter Text

EDExpress enables you to create user-defined text for letters you routinely send to students. You can create as many letters as you need. Letters are formatted so that when the letter is folded, the student's address appears in the window of a #10 window envelope.

To create User-Defined User Letter Text:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**.

2. Choose **User-Defined User Letter Text** to create your text.

3. Enter your text (up to 42 lines) and a title. You can associate the letter with a specific module.

4. Click **OK** to continue.

5. Click **Yes** to save.

Create User-Defined Award Letter Text

EDExpress enables you to create text for award letters. You can create as many letters as you need. Letters are formatted so that when the letter is folded, the student's address appears in the window of a #10 window envelope.

To create User-Defined Award Letter Text:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**.

2. Choose **User-Defined Award Letter Text**.

3. Enter your text (up to 12 lines) and choose to include a greeting with the student's name. If you include a greeting, we suggest you allow an extra space between the greeting and the text.

4. Click **OK** to continue.

5. Click **Yes** to save.

Create User-Defined Document Tracking Letter Text

EDExpress enables you to create text for document tracking letters. You can create as many letters as you need. Letters are formatted so that when the letter is folded, the student's address appears in the window of a #10 window envelope.

To create User-Defined Document Tracking Letter Text:

1. Select **Tools**, **Setup** from the menu bar, then choose **Global**.

2. Choose **User-Defined Doc Tracking Letter Text**.

3. Enter your text (up to 14 lines) and choose to include a greeting with the student's name. You can also choose to modify the preset text in text blocks 2 and 3.

4. Click **OK** to continue.

5. Click **Yes** to save.

What Is App Express?

The App Express module enables you to create, correct, review, print, export, and import student financial aid records:

- Enter FAFSAs by selecting the FAFSA tab, which takes you to FAA Access to CPS Online where you can enter initial applications for students.

- Correct student records by selecting the Student Inquiry tab, which takes you to FAA Access to CPS Online where you can enter corrections to specific transactions.

- Review ISIRs on the ISIR Review tab. where you can view students' ISIR data, print students' active transactions, or compare the data on two transactions for a particular student.

- Use the Print dialog box to print a variety of lists, reports, and records from the App Express module, including ISIRs, NSLDS data, List–Processed ISIRs, RL–User Defined Format, and Student Summary.

- Export student data to an ASCII file for use in spreadsheets or with external systems.

- Import ISIRs into App Express, where you can compare data, review and print ISIR data, and generate reports.

After you have imported ISIRs into App Express, you can import the accepted ISIRs into the Direct Loan and Pell modules to use for creating originations and disbursements and into the Packaging module to use for creating student aid packages.

App Express System Setup

To set up App Express System options that will be used when you import records:

1. Select **Tools**, **Setup** from the menu bar, then choose **App Express**, **System**.

2. Clear the **Update Demographic Data?** checkbox if you do not want EDExpress to update demographic records when you import ISIRs. EDExpress automatically updates the fields on a student's demographic record (Demo tab) when you import a higher transaction than the one currently in the EDExpress database.

   Leave the **Update Demographic Data?** checkbox selected if you want EDExpress to update the fields on the student's Demo tab when you import ISIRs. The demographic fields are updated only when a higher transaction number is imported.

   Note: Under normal circumstances, you should allow EDExpress to update demographic data.

3. Select the **Compare Demographic Data?** checkbox if you want EDExpress to print a list of changes made to demographic records during the ISIR import process as part of the Import Records Edit Report.

4. Click **OK** to continue.

5. Click **Yes** to save.

Importing and Printing ISIRs

Importing Data into EDExpress

Within three business days of entering FAFSA application data or ISIR corrections on the FAA Access to CPS Online Web site, the corresponding ISIRs are available for you to retrieve from your Student Aid Internet Gateway (SAIG) mailbox. See the EDconnect online Help or the *SAIG Desk Reference for EDconnect* at the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov, for more information. You must import the data into EDExpress to view the ISIRs in EDExpress.

New for 2006-2007! EDExpress automatically backs up your files rather than prompting you to back them up when 1000 files of the same message class already exist in the import or export directory. If EDExpress determines that 1000 files of the same message class already exist, the software creates a backup subdirectory called "BACKUP" in your existing data directory and automatically moves the files into it. This prevents previously imported or exported files from being overwritten when you import or export new files.

To import ISIRs into EDExpress:

1. Select **File**, **Import** from the menu bar, then choose **App Express**.

2. Confirm that "ISIR Data" appears in the Import Type field. If not, click the **down** arrow and select **ISIR Data**.

3. Click the **File** button in the Import From section of the screen and select the file you want to import.

4. Click **Open**.

5. Choose where you want to send the report: **File**, **Printer**, or **Screen**. If you choose File, click the **File** button and type a name for the file.

6. Click **OK** to import the file. A progress bar appears within the In Progress dialog box.

7. Click **OK** to close the In Progress dialog box when the import is finished.

An import ID is an identifier created for each student record in an import file at the time you import the file. The identifier is 14 characters long and is in the format CCYYMMDDHHMMSS, the date and time at the start of the import. "20060101120017," for example, would be the import ID of each student in a file imported on January 1, 2006, at 17 seconds after 12:00 noon. You can use the identifier to print all the student records in an individual file.

New for 2006-2007! The import ID created when you import an ISIR file prints on the Import Records Edit Report.

If you made a request for ISIRs from the ISIR Datamart on FAA Access to CPS Online using a query, the query title (up to 50 characters) prints on the ISIR Import Records Edit Report when you import the file.

Important Notes

- When you import ISIRs and select the **Identify Activated Transactions?** checkbox, the EFC of the active transaction and the EFC of the incoming ISIR appear on the Import Records Edit Report *if* the transaction number on the import file is greater than or equal to the transaction number on the database *and* the EFCs are different.

- ISIR data import types are listed under one category, ISIR Data, in the Import Type box.

- When you import ISIRs and select the **Identify incoming ISIRs with existing Packaging, Direct Loan, or Pell records?** checkbox, the Import Records Edit Report displays the "HAS FLAG" for Packaging, Direct Loan, and Pell if a record exists in those modules for the student.

- When an assumption has been made on an ISIR, a notation is displayed on the ISIR Review tab alerting you to the assumption and referring you to the List Changes dialog box, where you can view the assumed value or values for the ISIR. To view these values, select **Process**, **List Changes** from the menu bar.

Printing ISIRs

You can print single or multiple ISIRs or the List–Processed ISIRs report after you have imported ISIR records into EDExpress. A printed ISIR includes all the applicant information submitted by the student and the computed results from the CPS.

New for 2006-2007! The ISIR fields Rejected Status Change Flag and Verification Selection Flag now print in the FAA Information section of a printed ISIR.

New for 2006-2007! Since the ISIR record no longer contains the student's DRN, the DRN cannot be viewed, printed, used in a query, or exported in an external ISIR export.

To print a single ISIR:

1. Select **File**, **Print** from the menu bar, then choose **App Express**.

2. Confirm that "ISIR" appears as the Report type.

3. Select **Single** as the Report option if it is not already selected.

4. Choose where to send the report: **File**, **Printer**, or **Screen**. If you want to send the report to a file, click the **File** button and type a file name, then click **Open**. The file name appears in the box.

    If you chose **File** as your output destination, no paper copy prints (the information prints to the file). To print a paper copy, locate the file, open it using a text editing program such as Windows Notepad, and print it.

    If you chose **Screen** as your output destination, no paper copy prints (the information prints to your screen). Use the **scroll bars** to view the report and click **Close** when you are finished. To print a paper copy, click the **Print** button to print from the screen.

5. Type the student's Social Security Number, first two letters of the last name, and transaction number (01, 02, etc.) in the Trankey field, or click the **ellipsis (…)** button and select the ISIR you want to print from a list of ISIRs.

6. Select or clear the following options: **Only print records with more than six loans?**, **Print Certification/Signature Page?**, **Print FAA Comments?**, **Print SAR Comments?**, and **Print Loan Information?**

7. Click **OK**.

To print multiple ISIRs:

1. Select **File**, **Print** from the menu bar, then choose **App Express**.

2. Confirm that "ISIR" appears as the Report type.

3. Select **Multiple** as the Report option if it is not already selected.

4. Choose where to send the report: **File**, **Printer**, or **Screen**. If you choose to print to a file, click the **File** button and type a name for the file.

5. You have several options for choosing which ISIRs to print:

   - Click **OK** to print all the ISIRs in the EDExpress database.

   - Click the **Selection Criteria** button, then the **Select Records** button to choose specific ISIRs to print.

   - Use an SSN file. Click the **ellipsis (...)** button in the SSN File section of the dialog box. See online Help for information about creating SSN files.

   - Use a query to select students. Click the **Selection Criteria** button, then click the **ellipsis (...)** button next to Query Title to select a query.

   - Use the import ID to print all the students in a particular file. Type the import ID in the Import ID field or click the **ellipsis (…)** button to select the import ID from a list.

   New for 2006-2007! When you click the **ellipsis (…)** button in the Print dialog box to select from a list of import IDs, the Database dialog box displays a list of import IDs and the corresponding file names of the imported files.

6. Click the **down** arrow in the Sort Order field and select **SSN** or **Last Name** order. If you choose Last Name, records are sorted in order of last name, first name, and then transaction number. The default option is SSN order.

7. If you have a transaction preference, click the **down** arrow under Transaction Preference? and select **Highest**, **Active**, or **All** to print the highest transaction, the active transaction, or all transactions, respectively. If no transaction is activated, the default is the highest transaction.

8. Select or clear the following options: **Only print records with more than six loans?**, **Print Certification/Signature Page?**, **Print FAA Comments?**, **Print SAR Comments?**, and **Print Loan Information?**

9. Click **OK**.

Important Note

- The e-mail address that prints on the ISIR is labeled "E-mail Address 1" on the Demo tab, but prints on the ISIR as "E-mail Address."

To print the List–Processed ISIRs report:

1. Select **File**, **Print** from the menu bar.

2. Select the **App Express** tab.

3. Click the **down** arrow in the Report box and select **List–Processed ISIRs**.

4. Click **Printer**, **File**, or **Screen** for the output destination.

   If you want to send the report to a file, click the **File** button and type a file name, then click **Open**. The file name appears in the box.

   If you chose **File** as your output destination, no paper copy prints (the information prints to the file). To print a paper copy, locate the file, open it using a text editing program such as Windows Notepad, and print it.

   If you chose **Screen** as your output destination, no paper copy prints (the information prints to your screen). Use the **scroll bars** to view the report and click **Close** when you are finished. To print a paper copy, click the **Print** button to print from the screen.

5. (Optional) Click the **down** arrow next to Sort Order to specify the order in which you want ISIR data to print.

6. (Optional) Click the **down** arrow next to Transaction Preference to specify which ISIR transactions you want included on the report.

7. (Optional) Click the **ellipsis (…)** button to the right of Import ID to select the import ID associated with the ISIRs you want included on the report.

   New for 2006-2007! When you use the import ID to print groups of student records, the import ID you select prints on the List–Processed ISIRs report.

8. (Optional) Select or deselect other options as appropriate.

9. (Optional) Click the **Selection Criteria** button if you want to use specific selection criteria to narrow the number of records you want included on the report.

10. Click **OK** to send the list to the output destination you chose.

Exporting External Demographic and ISIR Data

External Demographic Data Export

EDExpress enables you to export demographic data to an external system. You can create Global file formats that include any of the fields on a student's demographic record, including the student's e-mail addresses.

New for 2006-2007! File formats are now limited to a maximum of 255 fields.

To export external demographic data:

1. Close any records that are open.

2. Select **File**, **Export** from the menu bar, then choose **Global**.

3. Confirm that "External Demographic Data" appears in the Export Type field. The default path and file name appear in the Export To field.

4. If you want to export using a different file name, click the **File** button and name the file.

5. Select the delimiter type.

6. Type the format code in the Format Code field, or click the **ellipsis (...)** button to select from a list of format codes.

7. (Optional) Click **Selection Criteria** to narrow the group of records you want to export. When you are finished, click **OK**.

8. Click **OK** to export the data. EDExpress exports the file to the file shown in the Export To field. An In Progress dialog box appears.

9. Click **OK** to close the In Progress dialog box when the export is finished.

Important Note

- To use the external export feature in Global, you must establish a file format. See the topic "File Formats" in the EDExpress online Help for more information.

External ISIR Export

EDExpress enables you to export ISIR data to an external system.

To export external ISIR data:

1. Close any records that are open.

2. Select **File**, **Export** from the menu bar, then choose **App Express**.

3. Confirm that "External ISIR" appears in the Export Type field. The default path and file name appear in the Export To field.

4. If you want to export using a different file name, click the **File** button and name the file.

5. Select the transaction preference.

6. Select the delimiter type.

7. Type the format code in the Format Code field, or click the **ellipsis (...)** button to select from a list of format codes.

8. (Optional) Click **Selection Criteria** to narrow the group of records you want to export. When you are finished, click **OK**.

9. Click **OK** to export the data. EDExpress exports the file to the file shown in the Export To field. An In Progress dialog box appears.

10. Click **OK** to close the In Progress dialog box when the export is finished.

Important Note

- To use the external export feature in App Express, you must establish a file format. See the topic "File Formats" in the EDExpress online Help for more information.

Introduction to Packaging

What Is Packaging?

Financial aid packaging is the process of tracking, awarding, and managing financial aid funds or resources. EDExpress Packaging uses the term *award methodology*. An award methodology is a formula that determines how financial aid funds are allocated to your students. Within EDExpress, the Package process automatically applies your school's award methodologies that you set up in the software to one or all of your students. Your students are packaged or awarded aid from the sources and amounts specified by your award methodologies and the criteria you attach to them.

This section of the desk reference guides you through the packaging process from setup through exporting your data. We recommend that you review the checklist provided at the beginning of the Packaging Setup section.

New for 2006-2007! For compliance with Section 508 of the Rehabilitation Act, all required fields highlighted in yellow now display an "-R" at the end of the field label.

New for 2006-2007! For compliance with Section 508 of the Rehabilitation Act, fields that turn blue when the value is changed now display a "-C" at the end of the field label when the change is saved.

New for 2006-2007! For compliance with Section 508 of the Rehabilitation Act, grids display floating text descriptions of the contents of grid cells. The text appears one cell above (or one cell below, for cells in the first line of a grid) the selected cell. The text lists row number, column title, and (if applicable) the current value. Clicking once in a cell, or using the Tab key or arrow keys to move to a cell, displays the text. Clicking a second time hides the text.

The first time you log in, the default user ID and password is SYSADMIN. The system then prompts you to change the default password by entering a new password and verifying it. Floating text is always enabled for the SYSADMIN user ID and always appears in the Startup Information dialog box. To disable the floating text, select **Tools**, **Setup**, **Security Users** from the menu bar and create a new user ID and password. Exit the software, and then log in again with your new user ID and password.

For all users other than SYSADMIN, floating text is disabled by default. To enable it, select the **Enable 508 Grid Functionality?** checkbox in the Security Users dialog box.

Packaging Setup

Packaging Setup Checklist

Follow the steps below before using the EDExpress Packaging module. The key to successful packaging with EDExpress is to plan and define your school guidelines thoroughly.

- Plan priority order for budget codes and award methodology codes

- Create queries for budget codes, fund maintenance codes, and award methodology codes

- Set up system values

- Establish academic year profiles

- Enter fund maintenance information

- Define award methodologies

- Establish budgets

- Define SAP values (optional)

- Set up user-defined database (optional; see "Set Up a User Database" section in this desk reference for more information)

- Set up user-defined formulas (optional)

- Write user-defined text (optional; see "Create User-Defined User Letter Text," "Create User-Defined Award Letter Text," and "Create User-Defined Document Tracking Letter Text" in this desk reference for more information)

Important Notes

- If you have not established your assumed school in Global System setup, you must do so before using the Packaging module.

- You can save time by importing much of your Packaging setup from EDExpress for Windows 2005-2006. See "Prior Year Import" in this desk reference for additional information.

- If using the Packaging module only to print the FISAP–Eligible Dependent and Independent Student reports, you only have to set up an academic year profile and a budget before importing ISIRs into Packaging. Refer to the EDExpress Help topic "Set Up Packaging to Print FISAP Reports" for detailed setup instructions.

- Complete all query setups before packaging any records.

Assign Priorities to Packaging Functions

Two packaging elements—Award Methodology and Budgets—are assigned according to priorities you establish.

Priority determines the order in which EDExpress evaluates packaging elements when making assignments, starting at the element with priority closest to 1.

The Packaging module compares the criteria assigned to that element with the student record being processed. If the record meets the given criteria, then that element is assigned to the record and no further elements of this type are considered. If the record does not meet the criteria, EDExpress goes to the element with the next highest priority. Priority is established highest to lowest, 1...999, A...ZZZ.

Example:

Code	Priority	Criteria
030	3	Dependency Status = I
020	2	Dependency Status = D
015	1	Dependency Status = D and Housing = 2

A dependent student who reports housing plans of 3 would not meet the criteria for Code 015. However, the student meets the next criteria and is assigned Code 020.

Important Notes

- The element with the most restrictive criteria should have the priority closest to 1 so that it is assessed and assigned first.

- The last priority should have no selection criteria, so it will include those students whose records are missing elements considered critical by your selection criteria.

- You may want to number the priorities in increments of 5 or 10 to give yourself more flexibility in the future for adding subsequent priorities between the previously created priorities. For example, by establishing priorities 5, 10, 15, etc., you can easily add a priority 13 that processes between priorities 10 and 15.

Packaging System Setup

To set up Packaging system values:

1. Select **Tools**, **Setup** from the menu bar, then choose **Packaging**, **System**.

2. Enter the following values:

Parameter	Description
Total Number of Award Letters to be Printed per Student?	This field defines the number of copies of the award letters to print for each student each time award letters are printed.
Maximum Number of Award Letters to be Sent per Student?	This field defines the number of times an award letter can be printed for an individual student when printing letters for multiple students.
Award Letter Type	This field defines which award letter type you want to print. **O** = Offer Letter **N** = Notification Letter
Allow imported Pell EFC to be Modified?	This field defines whether the Pell EFC is a protected field on records that were not manually entered. Select the checkbox if you want to allow the Pell EFC field to be modified after the ISIR is imported into Packaging.
Packaging Results Default Status	This field defines the packaging results default status on a student record after packaging. The two default options are: **O** = Offered **A** = Accepted
Priority Deadline Date Type	This field defines the date type you want to use as your priority deadline date when indexing for packaging process and reports. Valid priority date types are: **A** = Application Received Date **P** = Processed Date **R** = Ready Date **U** = User-Defined Date If the date type is **U**, the date is taken from the User Database field.

Parameter	Description
User Defined Date Name	This field defines the name of the User Database to be used when determining which student records to include or exclude in running a process. It is enabled only if the priority deadline date type is **U** (User-Defined Date).
Use Low Tuition?	This field enables you to access the Low Tuition Tables for use in packaging students who qualify.
Default Housing Plans	This field defines a default value for manually created records and imported ISIRs with a blank value for Housing Plans. Valid housing plan options are: **1** = On campus **2** = Off campus **3** = With parent

3. Click **OK** to continue.

4. Click **Yes** to save.

Establish Academic Year Profiles

Academic year profiles determine how your funds are divided. Academic Year Profile setup enables you to customize up to five terms, including distribution percentages for seven types of awards. You can create an unlimited number of academic year profiles.

For the academic year profiles, gather and enter information for Federal Pell Grant formulas (standard term, clock-hours, etc.) and distribution percentages for aid programs.

To establish academic year profiles:

1. Select **Tools**, **Setup** from the menu bar, then choose **Packaging**, **Academic Year Profile**.

2. If this is your first time adding an academic year profile, go to Step 3. To add more academic year profiles, click **Add**.

3. Enter or confirm the following values:

Parameter	Description
Code	This code is a four-character code you assign to identify each academic year profile.
Default	This field enables you to define your standard academic year profile for all records when importing from the ISIR database. Each school has only one default profile. However, if the profile is not assigned to any students, you can change this field at any time.
User Modified	The user ID of the person who last modified the academic year profile.
Date Modified	The date the academic profile was last modified.
Title	The title is the 50-character description of the academic year profile you have established.
Pell Grant Formula	This field is based on the school's definition of an academic year. Click the **down** arrow to view a list of valid Pell formulas: 1–Standard-term, credit-hour programs (30 weeks) 2–Standard-term, credit-hour programs (<30 weeks) 3–Any term-based credit-hour programs 4–Clock hour programs and credit-hour programs without terms 5–Correspondence Study, non term-based program 6–Correspondence Study, term-based program

Parameter	Description
Program Proration Percent	This field specifies the percentage of the student's program to be completed in the academic year. It applies only to: • Standard term credit-hour programs of less than 30 weeks, • Clock-hour and credit-hour programs without terms, and • Correspondence study non-term-based programs. Program proration 99.99 percent equals 100.00 percent. **New for 2006-2007!** EDExpress now enables you to use a percentage value of 100.00 in the Program Proration Percent field of the Academic Year Profile dialog box.
EFC program length to import from the ISIR database	This field sets the EFC Program Length derived from imported ISIR records.
Term	This field identifies a specific term that you designate. For example, Fall, Spring, Term One, Term Two, etc.
Enrollment Status	This field indicates the enrollment status to package for each term you define. For example, full-time, etc.
Percentages	This field defines the percentage of an annual award to post to a given term for each of seven aid types. For example, enter 50% for Perkins % to the first term if you want 50% of the annual Perkins amount awarded in the first term. Percentages cannot exceed 100%.

4. Click **OK** to continue.

5. Click **Yes** to save.

Enter Fund Maintenance Information

In Fund Maintenance setup, you can add and maintain as many aid sources as needed for packaging students. Fund Maintenance also provides you with instant information on the total funds awarded to your financial aid recipients.

To set up Fund Maintenance:

1. Select **Tools**, **Setup** from the menu bar, then choose **Packaging**, **Fund Maintenance**.

2. If this is your first time adding a fund, go to Step 3 below. For more funds, click **Add**.

3. Enter or confirm the following values:

Parameter	Description
User Modified	The user ID of the person who last modified the fund.
Date Modified	The date the fund was last modified.
Fund Code	This code is an abbreviated identification code (of up to eight characters) you assign to identify each fund.
Fund Description	This description is a full description (of up to 25 characters) of the fund you have established.
Aid Type	This field identifies the type of aid associated with this fund. Click the **down** arrow for a list of valid aid types. Aid types **D**, **E**, **F**, **K**, **P**, **S**, **W**, and **U** can be used only once, after which they no longer appear on the list. **E** = Federal Supplemental Education Opportunity Grant (FSEOG) **F** = Federal Pell Grant **G** = Any grant or scholarship, but not Pell Grant or FSEOG **R** = Grant Non-Need Based **K** = Federal Perkins loan **N** = Non-Need Based Loan (NNB) **L** = Other Need Based Loan (NB), not Perkins, Direct, or Stafford loans **S** = Subsidized Loan (Sub, Need Based) **U** = Unsubsidized Loan (Unsub, Non-need Based) **D** = Unsubsidized Loan (Unsub, Need Based) **P** = Federal Parent Loan for Undergraduate Students (PLUS) **O** = Outside Resources **V** = Chapter 30 VA Benefits/AmeriCorps **W** = Federal Work-Study (FWS) **Y** = Other Work-Study

Parameter	Description
Do not remove if unpackaged?	Select this checkbox if you want awards of this fund code to remain unmodified on a student record during the Unpackage process. If you activate this feature and repackage your students, funds *may* be awarded a second time.
Criteria	Use this field to select queries to determine the group of students eligible to receive this fund.
Beginning Balance	This field represents the beginning balance in your school's account for the upcoming year. **New for 2006-2007!** EDExpress now enables you to enter a nine-digit fund amount for Beginning Balance (000000000-999999999).
Adjustment to Beginning Balance	This field represents any adjustments (+ or -) to be made to the fund. **New for 2006-2007!** EDExpress now enables you to enter a nine-digit fund amount for Adjustment to Beginning Balance (-999999999-999999999).
Funds Awarded	This field reflects the current amount awarded to your eligible financial aid applicants. **New for 2006-2007!** Funds Awarded now displays a nine-digit amount (000000000-999999999).
Current Balance	This field represents the current outstanding fund balance remaining for your school to award. Once your current balance reaches zero, you can no longer award this fund to students (unless you enter a positive amount in the Adjustment to Beginning Balance field). **New for 2006-2007!** Current Balance now displays a nine-digit amount (000000000-999999999).
Remaining Need	Click this button to establish minimum and maximum need amounts for this fund. See the following section for additional information.

4. Click **OK** to continue.

5. Click **Yes** to save.

Important Notes

- Make sure that the aid type you selected matches the fund you are creating; for example, **F** = Federal Pell Grant.

- For Fund Maintenance examples, click **Help** in the Fund Maintenance dialog box, then choose the related topic Fund Maintenance Setup Examples.

Enter Remaining Need Information

You can award a specific amount from a fund at different levels of remaining need within the packaging process. For example, if you have a school fund that you want to award for different levels depending on the remaining need of the aid recipient, you can do so with this feature. Remaining need is optional for Packaging.

Example

Fund: School Need-Based Scholarship (Aid Type G)

After awarding Stafford loans (Sub/Unsub), if there is still at least $2500 or greater remaining need, you can direct Packaging to award $500. If at least $2000 to $2499 you award $300; if between $500 and $1999 you award $150.

The following aid types are excluded:

F	Federal Pell Grant
D	Unsubsidized Loan (Unsub. Need Based)
O	Outside Resources
V	Chapter 30 VA Benefits/AmeriCorps

You can set your remaining need amounts for all funds in Fund Maintenance setup by clicking the Remaining Need button, or you can set (or adjust) the remaining need amounts for each fund in the award methodology by clicking the Values button in the Remaining Need column.

The Remaining Need dialog box contains the following fields:

Minimum Need	Enter the minimum remaining need amount for awarding this fund.
Maximum Need	Enter the maximum remaining need amount for awarding this fund.
Award Amount	Enter the amount of this fund that you will award based on the Minimum and Maximum Need range.

Important Note

- Note that the minimum and maximum need amounts on one line should not overlap with the minimum and maximum need amounts on any other line. For example, if the first range is 0-500, the next range should start with 501 or higher.

Define Award Methodologies

You can establish methodologies for determining how various funds are awarded to a specific population of students. You must choose whether you will enter maximum percentages or dollar amounts.

For award methodology examples, click **Help** in the Award Methodology dialog box, then choose the related topic Award Methodology Setup Examples.

Important Notes

- For Funds Subsidized Loans (**S**), Unsubsidized Loans Non-need Based (**U**), Unsubsidized Loans Need Based (**D**), and PLUS Loans (**P**), we recommend you leave all 9s for the maximum EFC and the maximum amount. The system will calculate according to the statutory guidelines.

- Since the Federal Pell Grant is a calculated award, you cannot include the Pell Grant in your award methodology. EDExpress automatically awards Pell to eligible students if Pell is correctly defined in Fund Maintenance.

- Use the Criteria field to identify the group of students who will be packaged using this methodology. The criteria listed are created in Query.

- If you need to base your award methodology on EFC ranges, such as for a state grant that uses EFC ranges as criteria, you can have too many ranges to define in one award methodology code and still include other funds. In this situation, you can define Packaging queries for each EFC range. Add the EFC queries as primary query criteria to an equal number of award methodologies, then add the state grant to each methodology by using the Award Min and Award Max fields to control the exact award amount for that EFC range.

To define award methodologies:

1. Select **Tools**, **Setup** from the menu bar, then choose **Packaging**, **Award Methodology**.

2. If this is your first time adding an award methodology, go to Step 3. To add more award methodologies, click **Add**.

3. Enter or confirm the following values:

Parameter	Description
Code	This code is a four-character, user-defined code used to identify the methodologies.
User Modified	The user ID of the person who last modified the award methodology.
Date Modified	The date the award methodology was last modified.
Title	The title is the description (of up to 50 characters) of the award methodology. It should identify which students will be packaged using this methodology.
Priority	This field prioritizes the methodology in relation to other methodologies during the packaging process. During the packaging process, EDExpress selects the highest priority methodology met by the student. Consider creating a generic methodology and give it the lowest priority (in other words, highest number) to ensure every student is packaged, regardless of the criteria used in your other methodologies.
Use Percentages or Use Dollar Amount	These options enable you to use percentages or dollar amounts for the Self-Help and Gift Aid Maximum fields. Select the appropriate option.
Self-Help Aid Maximum	This field identifies the maximum of need to be met with self-help aid during the packaging process. This may be a percentage or a specific dollar amount.
Gift Aid Maximum	This field identifies the maximum of need to be met with gift aid during the packaging process. This may be a percentage or a specific dollar amount.
Criteria	This field determines what methodology is applied to a student's record, using your existing queries.
Fund Code	This field represents the fund codes associated with this award methodology to be used during the packaging process. Click the **down** arrow for a list of available fund codes.
Fund Priority	This field indicates the order in which funds will be awarded within this award methodology. Funds with priority 1 are awarded first.
School Minimum	This field indicates the minimum amount awarded for this fund within the award methodology.
School Max	This field indicates the maximum amount awarded for this fund within the award methodology.

Parameter	Description
Min EFC	This field identifies the minimum EFC allowed for this fund to be packaged when using the award methodology.
Max EFC	This field identifies the maximum EFC allowed for this fund to be packaged when using the award methodology.
Remaining Need	Click the **Value** button to view the remaining need values established in Fund Maintenance setup or to establish a remaining need value at the award methodology level. You can also modify values established in Fund Maintenance.

4. Click **OK** to continue.

5. Click **Yes** to save.

Establish Budgets

A budget defines the cost of attendance for a specified program in a standard academic year. An integral part of packaging at your school begins with assigning a budget for an applicant. In Packaging, you create customized budgets to meet your school's needs. You can create a single budget for your entire applicant population or separate budgets for subsets of your students.

For budget examples, click the **Help** in the Budgets dialog box, then choose the related topic Budget Setup Examples.

To establish budgets:

1. Select **Tools**, **Setup** from the menu bar, then choose **Packaging**, **Budgets**.

2. If this is your first time adding a budget, go to Step 3 below. For more budgets, click **Add**.

3. Enter or confirm the following values:

Parameter	Description
User Modified	The user ID of the person who last modified the budget.
Date Modified	The date the budget was last modified.
Budget Code	This code is a four-character, user-defined abbreviated identification code assigned to each budget. This code appears on the student's record.
Priority	This field enables you to prioritize the order in which EDExpress searches the budget database when assigning budgets. The first budget in which the student meets the selection criteria is used to package that student.
Budget Total	This field is the sum of the budget component amounts you entered, and is display only.
Pell COA	This field is used to calculate Pell awards only and can be modified in individual records and in multiple records using Multiple Entry.
Title	The title is the description of the budget. The title can be up to 50 characters.
Criteria	This field determines which budget is applied to a given student using your existing queries.
Budget Amounts	This field defines the amounts for the six budget components listed: Tuition and Fees, Loan Fees, Room and Board, Books and Supplies, Transportation Cost, and Miscellaneous. These can be left blank.
User Defined Budget Amounts	If the student's budget contains other components, enter the title and amount here.

4. Click **OK** to continue.

5. Click **Yes** to save.

Important Note

- Before packaging, a budget *must* be assigned to each student's record.

Define SAP Values (Optional)

EDExpress enables you to track Satisfactory Academic Progress (SAP) for each of your students. SAP Values give you the ability to develop separate codes for different types of progress. For example: **S** = Satisfactory Progress and **U** = Unsatisfactory Progress.

You can prevent records from being packaged if students do not meet your SAP criteria by creating SAP codes containing the No Packaging Flag. You must add the codes to student records prior to the packaging process. You can define an unlimited number of SAP codes.

For SAP values examples, click the **Help** button in the SAP Values dialog box.

To define SAP codes:

1. Select **Tools**, **Setup** from the menu bar, then choose **Packaging**, **SAP Values**.

2. Enter the following values for each SAP code:

Parameter	Description
SAP Code	This field is a two-character alphanumeric identifier.
No Packaging Flag	This option prevents students with this code from being packaged.
SAP Description	This field is a 50-character description of the code.

3. Click **OK** to continue.

4. Click **Yes** to save.

Set Up User-Defined Formulas (Optional)

User-defined formulas allow you to calculate data by adding, subtracting, multiplying, or dividing two existing fields in the EDExpress database.

For examples of user-defined formulas, click the **Help** button in the lower portion of the User-Defined Formulas dialog box. Use the **down** arrow to scroll to the User-Defined Formulas Examples.

To set up user-defined formulas:

1. Select **Tools**, **Setup** from the menu bar, then choose **Packaging**, **User-Defined Formulas**.

2. Enter or confirm the following values for each formula field you want to add to your database:

Parameter	Description
Table	This setting determines where the value you use in Field 1 resides. Enter: • **S** for a field from the Student Table (student database) • **F** for a field from the Fund Table (fund maintenance database) • **U** for a field from the User-Defined Table (user-defined database)
Field Name	This field lists all the fields that are available from the table chosen in the Database Table 1 Field.
Operand	This option lists the mathematical operations available: addition, subtraction, multiplication, or division.
Table	This setting determines where the value you use in Field 2 resides. Enter: • **S** for a field from the Student Table (student database) • **F** for a field from the Fund Table (fund maintenance database) • **U** for a field from the User-Defined Table (user-defined database)
Field Name	This field lists all the fields that are available from the table chosen in the Database Table 2 field.
Description	This description displays the name of the field that describes the result of your formula.

3. Click **OK** to continue.

4. Click **Yes** to save.

Important Notes

- The calculated results from any previously created user-defined formula can be used as a new formula field (in the **S** or Student database table) in another user-defined formula.

- Set up user-defined formulas *prior* to importing records into the Packaging database.

- You can create a user-defined formula after importing records into Packaging. After importing your records, create the new formula, then select **Process**, **Calculate User-Defined Formulas** from the menu bar to apply the new formula to your records.

Creating Packaging Records

Packaging Entry

You can use three types of entry to establish a packaging record:

- **Manually** enter data from a printed document, such as a SAR, an ISIR, or a paper FAFSA.

- **Import ISIR data** from the application processing module of EDExpress (App Express).

- **Import records** from your school system using the Import External Add option.

Important Note

- If you intend to import records from your school system, you must follow the record layouts found in the *Packaging Technical Reference*. It is available for download in Adobe PDF format from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov.

Manual Entry

If a student does not already have a demographic record in the database, follow the steps below to enter the student's record manually.

To enter a student record manually:

1. Select **File**, **New** from the menu bar.

2. Enter the student's SSN.

3. Enter the student's demographic information on the Demo tab. At minimum, you must enter a first or last name. For packaging purposes, enter the student's dependency status.

4. Click **Save**.

5. Click the **Awards** tab.

6. Complete the student's packaging record. Press **F1** for help with completing each field.

7. To save the packaging record, select **File**, **Save** from the menu bar.

8. To return to the EDExpress main screen, select **File**, **Close** from the menu bar

Important Note

- Make sure the correct dependency status appears on the Demo tab. Packaging awards funds, in part, based on this field.

Importing ISIRs

You can quickly establish a student's financial record by importing the student's ISIR data from App Express. The ISIR import process imports the active transaction. See online Help for more information.

The ISIR field "Are you male?" is imported into the Packaging module when you import ISIR data and can be used in queries. Since "Are you male?" is not a required field on the ISIR; however, the field may be blank on student records. The field is not displayed on the Packaging record.

To import ISIRs:

1. Select **File**, **Import** from the menu bar, then choose **Packaging**, **Packaging Data–ISIR Data**.

2. Enter the following values:

Parameter	Description
Report To	Choose **Printer**, **File**, or **Screen** to print, send to a file, or view the Packaging Import ISIR Data report. The report shows the results of the ISIR import process.
Add Budgets?	Choose this option to assign budgets automatically to the students upon import.
Print a list of imported packaging records?	Choose this option to print a list of records added during the ISIR import process.
Academic Year Profile	Choose this option to assign an academic year profile to each record during the ISIR import process. Click the **ellipsis** (**…**) button to display and select from a list of codes.
Selection Criteria	Choose Selection Criteria to narrow the selection of students during the ISIR import process.

3. Click **OK**.

Important Notes

- To avoid packaging a student's record in error, the Packaging module does not import rejected ISIRs from the App Express module.

- You must have at least one academic year profile code defined to import ISIRs. You may also want to set up your budget codes.

- If you import large numbers of ISIRs into Packaging, you may want to consider assigning your budgets at a later time in order to speed up the import process.

Importing External Records

You can import records from your school's external system into EDExpress to establish student financial aid records. To use the Import External Add or Change function, you must first create an input file according to the specifications provided in the *Packaging Technical Reference*, which is available in Adobe PDF format from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov.

If more than one record with the same Social Security Number (SSN) exists in an external add file, only the first record is imported. Duplicate records are skipped. The External Add Import Records Edit Report lists any records that were not imported.

To import external records from your school system:

1. Select **File**, **Import** from the menu bar, then choose **Packaging**.

2. Click the **down** arrow next to Import Type, then click **Packaging Data–External Add**, **Packaging Data–External Change**, or **Packaging Data–Add Fund Amounts**.

Parameter	Description
Add	This option enables you to add packaging records to the Packaging database.
Change	This option enables you to modify specific fields on an existing packaging record on the Packaging database.
Add Fund Amounts	This option enables you to update Fund awards on a student record by importing from an external file.
Report to	This option enables you to view, print, or send the output document to a file to be retained at your school.
Print a list of imported packaging records?	This option enables you to print a listing of records added during the Import External process.
Print Successfully Imported Funds?	This option enables you to print successfully imported funds. Select this checkbox to print the Funds Imported Report upon completion of the import process.

3. Click **OK**.

The Package, Unpackage, and Repackage Processes

The Basic Processes

The Package, Unpackage, and Repackage processes are available in two different modes.

Single Student

Use this method to package, unpackage, or repackage a student's record with the student's record open.

To package, unpackage, or repackage an individual student record:

1. Select **File**, **Open** from the menu bar.

2. Enter the student's SSN.

3. Click **OK**.

4. Click the student's **Awards** tab.

5. Select **Process** from the menu bar, then choose **Package**, **Unpackage**, or **Repackage**.

Multiple Students

Use this method to package, unpackage, or repackage a group of student records by selecting Process, Package from the menu bar, then choosing Selection Criteria. You can also use the Sort By option to sort the records you selected to package. When the process is complete, EDExpress asks if you would like to print a list of packaged students. The list includes the student's name and Social Security Number (SSN).

To package, unpackage, or repackage a group of students:

1. With records closed, select **Process** from the menu bar, then choose **Package**, **Unpackage**, or **Repackage**.

2. Use selection criteria to specify a group of students to package.

3. Use the Sort By option to prioritize the students in your selected group. Click **Help** for more information.

4. Click **OK**.

Note: You can also package, unpackage, or repackage a single student from outside the stuent's record by following the steps above and using selection criteria to select an individual student.

Package

The Package process creates a student financial aid package for a student or a group of students in your Packaging database.

Important Note

- Note the current Packaging Status field in the upper right corner of the screen:

  H = Hand Packaged

  M = Manually Adjusted Package

  N = Not Ready to Package

  P = Packaged

  R = Ready to Package

  U = Unpackaged

Unpackage

The Unpackage process reverses the Package process. It performs these actions:

- Returns all monies to the funds from which they originated in Fund Maintenance, except for the funds awarded as Outside Resources, Aid Type **O**. These funds (which are often awarded by hand) remain awarded to the student and are not returned to Fund Maintenance.

- Changes the packaging status to U.

Important Notes

- The Unpackage process returns awarded funds to the fund accounts you established in Fund Maintenance. Note that awarded funds marked "Do not remove if unpackaged?" are retained on the student record.

- Do not use selection criteria if you want to unpackage all of your packaged records.

- After unpackaging a student, the status flag is changed from **P** (Packaged), **H** (Hand Packaged), or **M** (Manually Adjusted Package) to **U** (Unpackaged).

Repackage

The Repackage process recomputes the entire financial aid package of individual students or groups of students based on changes to their demographic information, financial data, award methodology, or fund values.

Important Note

- To repackage records, the packaging status must be **P** (Packaged), **H** (Hand Packaged), or **M** (Manually Adjusted Package).

Printing Reports

Print Award Letters

In EDExpress, you can print two types of award letters:

- **Financial Aid Award Offer**: Students return this letter to the financial aid office if they want to accept part or all of the award.

- **Financial Aid Award Notification**: Students do not need to return this letter to the financial aid office if they accept the total award. This letter still gives the student the option to decline part or all of the award by marking the declined fund and returning the award letter.

Award letters can be printed for a single student or a group of students.

Since the student's Social Security Number (SSN) is excluded from e-mailed letters for security reasons, the **Exclude SSN?** checkbox is automatically selected and unable to be cleared (unless you select a different print option) when you choose **E-Mail** as the letter destination on the Print dialog box.

In Global System setup, you can choose to use the student's E-mail Address 1 or E-mail Address 2 on reports that can be e-mailed directly to students, such as document tracking letters and award letters. E-mail Address 1 is the default value. You can change this setting in the Print dialog box for a specific print job at any time, but the default setting remains the same until you change it in Global System setup.

To print award letters:

1. Select **File**, **Print** from the menu bar, then choose **Packaging**.

2. Click the **down** arrow next to Report and select **Letters–Award**.

3. Click **Single** to print a letter for a single student; click **Multiple** to print a letter for a group of students.

4. Click **Printer**, **File**, **Screen**, or **E-mail** for the output destination. If you print to the screen, the letter count is not affected. If you want to send the report to a file, click the **File** button to locate and name the file, then click **OK**. EDExpress automatically enters the file name in the field.

5. Enter the following values:

Parameter	Description
Enter SSN	(Single option only) This field is the SSN of the student who will be receiving the letter.
Address	This field specifies the address you want to use. The information is taken from the Demo tab.
	In Global System setup, you can choose to use the student's permanent or local address on all printed items that include the student's address, such as mailing labels. The student's permanent address is the default value. You can change this setting in the Print dialog box for a specific print job at any time, but the default setting remains the same until you change it in Global System setup.
Sort Order	(Multiple option only) This field specifies the order in which the letters will print. Sort order options are Last Name, SSN, or Zip Code.
Acceptance Date (Offer Letter)	This date is the date you want the student to respond to the award package. This date prints on the award letter. The acceptance date is not available for notification letters (this option is dimmed on the screen), but is required for offer letters.
Exclude Heading from Letter?	This option omits the heading "Financial Aid Award Notification XXXX-XX Award Year" from the award letter.
Exclude Records with Award Letter Received?	(Multiple option only) This checkbox prevents printing award letters already marked as received.

Parameter	Description
Exclude Needs Analysis?	This option omits the needs analysis detail from the award letter.
Print User Defined Text?	This option prints the text you set up in User-Defined User Letter Text setup.
Print Missing Documents?	This option prints a list of requested documents missing or incomplete from the student's file.
Exclude Signature?	This option omits the signature block on the award letter.
Exclude SSN?	This option excludes the student's Social Security Number from the award letter.
Print School Name/Address?	This option is selected automatically by EDExpress. By clearing this checkbox, you are indicating you *do not* want the school's name and address to print on the award letter.

6. Click the **Selection Criteria** button (Multiple option only) if you want to narrow the number of records you want to work with.

7. Click **OK**.

Print FISAP-Eligible Dependent/Independent Students

This option prints a detailed page of student information, including the student's FISAP income range. Also, you can print a report displaying the distribution of all eligible dependent or eligible independent students by income range in your Packaging database. This report is helpful when you are preparing Part II, Section F of the FISAP.

To print FISAP-eligible dependent/independent student information:

1. Select **File**, **Print** from the menu bar, then choose **Packaging**.

2. Click the **down** arrow next to Report and select **FISAP–Eligible Dependent Students** or **FISAP–Eligible Independent Students**.

3. Click **Printer**, **File**, or **Screen** as the output destination. If you want to send the report to a file, click the **File** button to locate and name the file, then click **OK**. EDExpress automatically enters the file name in the field.

4. Select the **Print Details?** checkbox for a student-by-student listing of records included in the FISAP summary report.

5. Click **OK**.

Important Notes

- The FISAP is the Fiscal Operations Report and Application to Participate for Funds.

- For further information on completing the FISAP, see the FISAP Form and Instructions on the Information for Financial Aid Professionals (IFAP) Web site, located at ifap.ed.gov.

- If you package a student but the student does not attend your school, unpackage and delete that student's packaging record so that the student does not appear on the FISAP grid in EDExpress.

- If using the Packaging module only to print the FISAP–Eligible Dependent and Independent Student reports, you only have to set up an academic year profile and a budget before importing ISIRs into Packaging. Refer to the EDExpress Help topic "Set Up Packaging to Print FISAP Reports" for detailed setup instructions. Keep in mind that for the fiscal operations report, you must use student information from the previous award year. For example, in 2007, you will report student information for the 2005-2006 award year, so make sure you print FISAP information from the correct version of EDExpress.

Print Lists

Using this option, you can print a variety of lists and other items. These include:

Lists

- List–Fund Maintenance
- List–Students by Fund Code
- List–Packaged Students
- List–Unpackaged Students
- List–Entered Packaging Records
- List–Packaging Setup
- List–Funds Forecast

Other Items

- Packaging Record
- Measurement Tools–Funds
- Record Layout–User Defined Formats

    New for 2006-2007! The RL - User-Defined Format record layout now prints the following additional fields:

    - File Format Code
    - File Format Description
    - Module (Global, Application Processing, Packaging, Direct Loan, or Pell)

    In addition, the record layout prints in the same format for all modules.

- Student Summary

    New for 2006-2007! Dollar amounts in the Pell Grant section of the Student Summary now print in dollars and cents.

To print lists:

1. Select **File**, **Print** from the menu bar, then choose **Packaging**.

2. Click the **down** arrow next to Report and select the item that you want to print.

3. Click **Printer**, **File**, or **Screen** as the output destination. If you want to send the report to a file, click the **File** button and type a name for the file. EDExpress automatically enters the file name in the field.

    If you print to a file, no hard copy prints on your printer. To print a hard copy, repeat the print process and select **Printer** as your output destination.

4. Depending on the item you selected, select the remaining options available to you on the screen.

5. (Optional) Click **Selection Criteria** to select specific records or to use a query to select a group of records.

6. Click **OK**. If you chose Screen as your output destination, use the **scroll bars** to view the list. Click **Close** when you have finished.

Exporting Packaging Data

Packaging Export

EDExpress enables you to export Packaging data to an external system.

To export Packaging data:

1. Close any records that are open.

2. Select **File**, **Export** from the menu bar, then choose **Packaging**.

3. Confirm that **Packaging Data** appears in the Export Type field. The default path and file name appear in the Export To field.

4. If you want to export using a different file name, click the **File** button and name the file.

5. Select the export status.

    Note: When you create a packaging record, the display only External Export flag on the Awards tab is set to **Y**, indicating that the record can be exported in an External Export file. Selecting **Y** as the Export Status exports packaging records that have **Y** as the External Export flag. If the packaging record is not complete, or if you have previously exported the packaging record, the External Export flag is set to **N**.

    Selecting **N** as the Export Status exports packaging records that have **N** as the External Export flag. Selecting Both exports packaging records with either **Y** or **N** as the External Export flag. If you make changes to a student's packaging record that has **N** as the External Export flag, the External Export flag changes back to **Y**.

6. Select the delimiter type.

7. Type the format code in the Format Code field, or click the **ellipsis (...)** button to select from a list of format codes.

   8. (Optional) Click **Selection Criteria** to narrow the group of records you want to export. When you are finished, click **OK**.

9. Click **OK** to export the data. EDExpress exports the file to the file shown in the Export To field, and an In Progress dialog box appears.

10. Click **OK** to close the In Progress dialog box when the export is finished.

Important Notes

- To use the Export feature in Packaging, you must establish a file format. See the topic "File Formats (Packaging)" in the EDExpress online Help for more information.

  New for 2006-2007! File formats are now limited to a maximum of 255 fields.

- The default export message class is PKEX07IN.

Query

Rules for Queries

A query is a set of criteria that describes a particular student population. Queries are used in functions like Print and Export to select specific groups of student records from all records in the database. Some queries have fixed values, and for others you can enter different values each time you use the query.

Queries are specific to individual modules, so you must create your queries in the modules in which you intend to use them. For example, if you need a query to use when printing a list of ISIRs, you must create the query in the App Express module.

When creating your own queries, consider these basic rules:

- Queries are processed from left to right, or beginning to end; however, AND is applied first, even if it appears after OR in the query statement.

- Parentheses change the order of precedence. Expressions enclosed in parentheses are processed before AND and OR. In the case of nested expressions, innermost parentheses are processed first. See the topic "Using Parentheses" in the online Help for more information.

- Both segments of the query connected by AND must be true for a record to be selected.

- Only one of the segments connected by OR must be true for a record to be selected.

Helpful Hints!

- Select the **Field to Field Comparison** checkbox to build a query that compares numeric fields within one record. For example, if a student has two ISIR transactions, a field-to-field query in App Express compares the numeric fields in the 01 transaction only with the other numeric fields in the 01, not with the numeric fields in the 02. This option is not available if you selected Prompt at Execution or Current Date. See "Field to Field Queries" in this desk reference for examples.

- Select **Help**, **Help Topics** from the menu bar, then choose **Contents**, **Query dialog box** for information about:

  – Query dialog box

  – Query Grid dialog box

  – Parameter Query Entry dialog box

  – View Query dialog box

Creating a Query

For information about creating complex queries with nested expressions, see the topic "Rules for Queries" in online Help.

To create a query:

1. Select **Tools**, **Query** from the menu bar.

2. Click the tab of the module for which you want to create the query.

3. Click **Add**.

4. Type a descriptive title for the query. The title can consist of any keyboard character except the pipe symbol (|) and apostrophe (').

5. Select a field from the Field list. You can type the first letters of a field to find the field name that begins with those letters.

6. Click the **down** arrow in the Operator field to select an operator.

7. Type a value for the field. Click the **Value Help** button to see the valid values for the field.

   Tip: If you want to be prompted for a value at the time you use the query, do not specify a value for the query statement. Instead, select the **Prompt at Execution** checkbox. Note that Prompt at Execution queries cannot be used with Packaging setup.

8. Click the **Append** button to add the query statement to the Criteria field.

9. (Optional) Click the **And** button or the **Or** button to add another statement to the query.

10. Repeat steps 5-9 until you have added all statements for the query, then continue with step 11.

11. Click **Save** to save the query. Click **OK**.

12. Click **OK** to close the Query dialog box or click **Add** to create another query.

Creating a Query from a Predefined Query

EDExpress comes with a set of predefined queries commonly used in Global, App Express, Packaging, Direct Loan, and Pell. Wherever the Selection Criteria option is available in EDExpress, you can use these queries to identify groups of records. See "Using a Query" in this desk reference for more information.

You can also use predefined queries as templates to create your own queries.

When you open Query for the first time, you will see that the predefined queries are stored as the first set of records in the Query database. You will know a query is predefined if you see "PREDEFINED QUERY" in the upper right corner of the Query dialog box.

Use the Query function to create queries that are most useful to your school and the way you process data.

To create a query from a predefined query:

1. Select **Tools**, **Query** from the menu bar.

2. Click the tab of the module for which you want to create the query.

3. Click the **Retrieve** button. Use the arrow buttons in the database buttons box to locate the predefined query you want to use for a template. Click **OK**.

4. Type a new title for the query. You can modify and save a predefined query only if you rename it.

5. To delete a line, select the line and click **Remove**. To add a new line, select the line in the Criteria field above where you want to add the new line. Specify the Field, Operator, and Value for the new line, then click **Append**. Use the other buttons located to the right of the Criteria field to fine-tune the query statement, if necessary.

6. Click **Save** to save the query. Click **OK**.

7. Click **OK** to close the Query dialog box or click **Add** to create another query.

Important Note

*   Parameter (Prompt at Execution) queries *cannot* be used with Packaging setup (for example, Fund Maintenance and Award Methodology).

Modifying a Query

To modify a query:

1. Select **Tools, Query** from the menu bar.

2. Click the tab of the module for the query you want to modify.

3. Click the **Retrieve** button. Use the arrow buttons in the database buttons box to locate the query you want to modify.

4. Modify the query. Click any criteria line to select it and change the Field, Operator, or Value. Then click the **Change** button. You can also delete lines or add new lines to the query.

    To delete a line, select the line and click **Remove**. To add a new line, select the line in the Criteria field above where you want to insert the new line. Specify the Field, Operator, and Value for the new line, then click **Append**. Use the other buttons located to the right of the Criteria field to fine-tune the query statement, if necessary.

5. Click **Save** to save the query. Click **OK**.

6. Click **OK** to close the Query dialog box.

Using a Query

You can use queries in any function where you see a Selection Criteria button, such as when you are printing lists, importing ISIR data into Packaging, exporting packaging data, using multiple entry, and packaging, unpackaging, and repackaging student records.

To use a query:

1. Click the **Selection Criteria** button.

2. Click the **ellipsis (…)** button next to the Query Title field to display a list of queries. The Query Grid dialog box appears.

3. Click the query you want to use to select it.

   - If the Parameter Query column is not selected, click **OK**. EDExpress returns you to the Selection Criteria dialog box and enters the title of the query in the Query Title field. Skip to step 8.

   - If the Parameter Query column is selected, click **OK**. EDExpress returns you to the Selection Criteria dialog box and enters the title of the query in the Query Title field. Click **OK** again and the Parameter Query Entry dialog box appears.

4. Click in the **Field Value** column next to each Field Name and type a valid value. Click the **Value Help** button to see a list of valid values.

   If you leave a value blank, EDExpress automatically enters NULL as the value. When you run the query, records that contain NULL for that field value are selected.

5. Click the **View Query** button to see the completed query. Review the query carefully to be sure you have entered the correct values for each field.

6. Click **Close** to return to the Parameter Query Entry dialog box.

7. Click **OK** to save your entries.

8. Click **OK** to run the query. An In Progress dialog box displays the progress of the process.

9. Click **OK** to clear the In Progress dialog box.

Sample Queries

Here are three examples of queries that you can use in processing your students' financial aid data. See "Using a Query" for instructions on how to use these queries.

Sample 1

Dependent students from New Mexico whose parents' number in college is greater than 1 or whose adjusted gross income is less than $25,000.

Click the **App Express** tab.

((DEPENDENCY STATUS = 'D') AND

(STUDENT'S STATE OF LEGAL RESIDENCE = 'NM')) AND

((PARENTS' NUMBER IN COLLEGE > '1') OR

(PARENTS' ADJUSTED GROSS

INCOME < '25000'))

Sample 2

Graduate students under 2000 EFC who are not packaged

Click the **Packaging** tab.

(EFC-PACKAGING<2000) AND

((COLLEGE GRADE LEVEL-PACKAGING = '6') OR

(COLLEGE GRADE LEVEL-PACKAGING = '7')) AND

((PACKAGING STATUS = 'N') OR

(PACKAGING STATUS = 'R') OR

(PACKAGING STATUS = 'U'))

Sample 3

Independent students assigned documents required for packaging and/or verification.

Click the **Packaging** tab.

((DOCUMENT STATUS = 'P') OR

(DOCUMENT STATUS = 'V') OR

(DOCUMENT STATUS = 'B')) AND

(DEPENDENCY STATUS = 'I')

Field to Field Queries

The Field to Field option helps you build a query that compares numeric fields within one record. For example, if a student has two ISIR transactions, a field to field query compares the numeric fields in the 01 transaction only with the other numeric fields in the 01, not with the numeric fields in the 02. This option is not available if you marked Prompt at Execution or Current Date.

Examples of Field to Field Queries

As an example of how to use this function, you can query on taxes paid as a percentage of AGI. The statement would look something like this:

PARENTS' U.S. INCOME TAX > PARENTS' ADJUSTED GROSS INCOME * 0.10 (or other decimal for the percentage you choose)

More examples:

Father's Income > Parents' Adjusted Gross Income

Mother's Income > Parents' Adjusted Gross Income

Student's Income > Student's Adjusted Gross Income

Student's U.S. income Tax Paid > Student's Adjusted Gross Income * 0.22 (or other percentage you choose)

Worksheet A > Student's Adjusted Gross Income * 0.07 (or other percentage you choose)

Worksheet B > Student's Adjusted Gross Income * 0.11 (or other percentage you choose)

Worksheet C > Student's Adjusted Gross Income

Deleting a Query

To delete a query:

1. Select **Tools**, **Query** from the menu bar.

2. Click the tab of the module for the query you want to delete.

3. Use the arrow buttons in the database buttons box to locate the query you want to delete. You cannot delete predefined queries.

4. Click **Delete** in the database buttons box. EDExpress asks you to confirm that you want to delete the query.

5. Click **Yes** to delete the query.

6. Click **OK** to continue.

Bits and Bytes

Message Classes (Sent by CPS)

Data Type	Message Class	Data Description
Daily	IDAP07OP	Daily ISIRs that are the result of application records submitted by the school
Daily	IDSA07OP	Daily ISIRs that are generated for all schools listed on the record
Daily	IDRE07OP	Daily ISIRs for state agency residents
Daily	IDNR07OP	ISIRs for state agency non-residents
CPS Pushed	IGCO07OP	CPS Pushed ISIRs that are the result of correction records submitted by the school
CPS Pushed	IGSA07OP	CPS Pushed ISIRs that are generated for all schools listed on the record
CPS Pushed	IGSG07OP	CPS Pushed system-generated ISIRs

Data Type	Message Class	Data Description
CPS Pushed	IGRE07OP	CPS Pushed ISIRs for state agency residents
CPS Pushed	IGNR07OP	CPS Pushed ISIRs for state agency non-residents
Requested	ISRF07OP	ISIRs requested directly from the ISIR Datamart
Errors	EAPR07OP	Error records from processing of application data
Errors	CORE07OP	Error records from processing of correction data
Errors	SIGA07OP	Error records from processing of signature records

Helpful Hint!

For record lengths, see the *EDE Technical Reference*, which is available for download in Adobe PDF format from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov.

Downloading EDExpress Software and Documentation

EDExpress for Windows 2006-2007, Release 1.0, is distributed on the Internet. You can download the software and the related user documentation in Adobe PDF format from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov.

The following types of paper documentation are available on FSAdownload in Adobe PDF format:

- Installation guides
- Cover letters
- Technical references
- Desk references
- Process guides

Instructions for downloading EDExpress for Windows software and documentation are located in the "Downloading Documentation and Software from the FSADownload Web site" chapter of the *EDExpress for Windows 2006-2007 Installation Guide*. The amount of time it takes to download a file depends on the file size and the speed of your Internet connection. If you do not have a direct connection to the Internet, a 56 KB modem is recommended.

If you experience difficulties with the EDExpress for Windows 2006-2007, Release 1.0 software, contact CPS/SAIG Technical Support at **800/330-5947** (TDD/TTY **800/516-5806**), or by e-mail at CPSSAIG@ed.gov.

Important Note

- Some organizations block their users' ability to download software from the Internet. If you have trouble downloading EDExpress, try again later. If you are still unable to download, contact your technical support staff to ensure you have full download rights.

Getting Help

Online Help

General help is available from the menu bar within EDExpress. You can view the main list of help topics by selecting **Help**, **Help Topics**, **Contents** from the EDExpress menu bar. If you are unfamiliar with using online Help within Windows applications, select **Help**, **Using Help**. Use the **Find** tab on the Help screen to locate specific words or phrases anywhere within Help. Also, field help is available by pressing the F1 key.

Helpful Hints!

- Open the Help Contents books to access Help topics. Each book contains several individual Help topics.

- Check the How Do I? topics for frequently performed procedures by selecting How Do I? from the Help menu.

CPS/SAIG Technical Support

For questions regarding technical assistance and software functionality, call CPS/SAIG Technical Support at:

800/330-5947

TDD/TTY: 800/516-5806

Customer service representatives are available 7 a.m.–7 p.m. (CT), Monday through Friday, excluding federal holidays. You can also e-mail your inquiries to the CPS/SAIG at CPSSAIG@ed.gov.

Sources of Assistance for Schools

Sources of Assistance for Schools contains helpful contact information for all Federal Student Aid programs, including frequently called help lines, e-mail addresses, phone numbers, and Web site addresses. The document is available for download in Adobe PDF format from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov.

Technical References

Technical references are manuals provided to postsecondary schools and third-party servicers. These manuals include record layouts, data entry specifications, import and export formats, and print specifications that you can use to develop your own EDE system or software to interface with EDExpress. The three technical references that are available from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov, are:

- The ***EDE Technical Reference***, which is a compilation of record layouts, processing codes, and ISIR printing formats provided to assist EDE participants in developing their own software to interface with EDExpress. For further assistance, call **800/330-5947** (TDD/TTY **800/516-5806**).

- The ***Packaging Technical Reference***, which is a compilation of record layouts for adding and changing records in the Packaging module of EDExpress.

- The ***Common Origination and Disbursement (COD) Technical Reference***, which provides processing information and technical specifications for Full Participant schools transmitting the Common Record in XML format and Phase-In Participant schools transmitting the Common Record in legacy format to the COD system.